

Enhanced Auditing (Show History)

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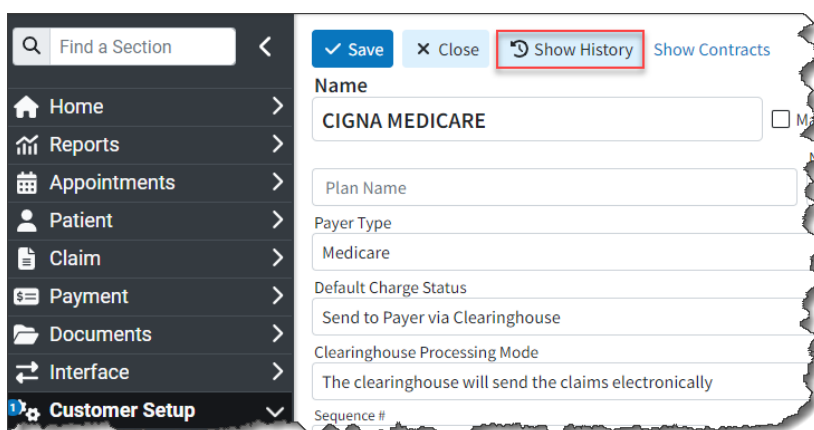
CollaborateMD's new **Enhanced User Auditing** allows you to see a detailed list of changes made to specific records throughout the application. This new auditing tool enables users to track modifications, changes, and updates within CMD for better auditing and accountability. With the new "Show History" feature, you can now determine which user changed specific information in the software and when by providing an auditing table with all updates/changes made to a record, including the user, date & time, and the item changed. These new auditing records are also included in our existing User Audit Report, making it an even stronger tool for auditing multiple records simultaneously.

⚠ Show History capability has been deployed only in the Customer Setup, Patient, Claim, and Appointments sections. We will be systematically adding it to other sections of the application. Please note that history is not available for updates made before 08/26/2024 (or the date the section's auditing became active).

View Enhanced Auditing History (Single Record)

This action allows you to review the audit history of a single record to determine which user made changes to the record, when the changes were made, and what the changes were.

1. Navigate to your desired section in the application (practice, provider, Codes, etc.) and select your record
2. Within the record click **Show History**



3. The history audit table will display every change/update associated with the record, including:
 1. **Username:** User that made the change/update
 2. **Date/Time:** date and time that it was updated

3. **Audit Type:** Type of audit (Create, Change, Delete) record

4. **Audit ID:** Unique identifier of the update.

Payer History: CIGNA MEDICARE

Thursday, 08/15/2024 at 3:43 PM GMT-4
1 change made by user *josephmuniz* Audit ID: 2575645660

Thursday, 08/15/2024 at 3:43 PM GMT-4 Audit ID: 2575645659
2 changes made by user *josephmuniz*

Thursday, 08/15/2024 at 3:42 PM GMT-4 Audit ID: 2575645658
6 changes made by user *josephmuniz*

History not available for updates made before 08/26/2024

Thursday, 08/15/2024 at 3:41 PM GMT-4 Audit ID: 2575645657
Created by user *josephmuniz*

Close

4. Expand the audit record to display the changes made within the record by clicking the **Expand** arrow

Thursday, 08/15/2024 at 3:43 PM GMT-4 Audit ID: 2575645660
1 change made by user *josephmuniz*

Thursday, 08/15/2024 at 3:43 PM GMT-4 Audit ID: 2575645659
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Thursday, 08/15/2024 at 3:41 PM GMT-4 Audit ID: 2575645657
Created by user *josephmuniz*

5. **Optional:** You can search for specific records within the audit log table by entering all or part of a keyword.

3. The expanded audit history will display the changed field name, the old value, and the new value.

Payer History: CIGNA MEDICARE

PROVIDER ↑ ↓

> Thursday, 08/15/2024 at 3:43 PM GMT-4 Audit ID: 2575645660
 1 change made by user *josephmuniz*

Thursday, 08/15/2024 at 3:43 PM GMT-4 Audit ID: 2575645659
 2 changes made by user *josephmuniz*

Field	Old Value	New Value
Use Provider on Box 33	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Do not apply prompt payment discounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>

▼


> Thursday, 08/15/2024 at 3:42 PM GMT-4 Audit ID: 2575645658
 6 changes made by user *josephmuniz*

History not available for updates made before 08/26/2024

Thursday, 08/15/2024 at 3:41 PM GMT-4

Close

4. Once finished, Click **Close**.

 Need to audit multiple records at once? Use our User Audit report to pull up multiple audit records along with their unique Audit IDs that can be clicked to view detailed changes. Visit our [View Enhanced Auditing History for Multiple Records \(User Audit Report\) Help Article](#) for more information on using reports.


View Enhanced Auditing History for Multiple Records (User Audit Report)

The User Audit Report now allows you to track modifications, changes, and updates made by users within MD for multiple records simultaneously. It includes a new Audit ID column with hyperlinks that, when clicked, will open the audit history for that record with details of every change.

1. Select **Reports > Viewer**
2. Find the **User Audit Report**

All Reports

Search for reports (3 characters)

USER AUDIT  Edit

Expand All

Management Reports

User Audit Report

3. Click the report
4. Select your filters:

 Save time by saving your most commonly used filters by clicking the **Save Filters** button. Once saved, you can load them by clicking the **Saved Filters** button and loading your filters.

1. General Filters:

1. Use the **Audit Entity ID** to filter by specific audit entity ID (sequence #).
2. Use the **Audit Patient ID** to filter by a specific patient in the database.
3. Use the **Audit Entered Date** to filter by a specific date or date range.
4. Use the **Audit Action** drop-down to filter by specific action(s) (Create, Modify, Delete).
5. Use the **Audit Type** drop-down to filter by specific type(s) (Practice, Providers, Payers, etc.).

2. Customer Filters:

1. Use the **Customer** filter to define which customer(s) the report will pull the data from.

3. Audit Username Filters:

1. Use the **Audit Username** filter to select specific user(s) to audit within the report.

5. After selecting your filters, click **Run Report**.

6. **Optional:** When running a report for more than one customer, you'll be asked if you would like to separate this report per customer.

1. **Yes, Separate** will run the report for the selected customers but separate the results for each customer. When the report results are displayed, click on the Show results for the drop-down menu to select a customer.

2. **No, Combine** will combine the results for all selected customers.

7. Within the results window, click the Audit ID hyperlink (in the Audit ID column) for the record you want to see the audit details expanded.

The screenshot shows a web application interface for a 'User Audit Report'. On the left is a dark sidebar with navigation options: Home, Reports, Viewer, Builder, Settings, Appointments, Patient, Claim, Payment, Documents, Interface, Customer Setup, and Account Administration. The main content area has a header with 'Run Report' and 'User Audit Report' tabs, and buttons for 'Print/Export', 'Save', 'Refresh', and 'More'. Below the header, it displays 'Run date: August 15, 2024 at 5:16 PM' and 'Customer is COLLABORATEMD'. A 'Main Table' is shown with a table of audit records. The 'Audit ID' column is highlighted, and the record with ID 2575645643 is selected.

Audit ID	Audit Username	Audit Action	Audit Type	Audit Entered Date	Audit Entity ID
2551532851	skalam	Create	Payer	07/18/2024 14:53:39	13210364
2575638638	irenelopez	Modify	Payer	08/14/2024 08:16:03	10013917
2575645643	josephmuniz	Modify	Payer	08/15/2024 13:50:02	13096074
2575645645	josephmuniz	Modify	Payer	08/15/2024 13:50:33	13096074
2575645655	josephmuniz	Delete	Payer	08/15/2024 15:39:14	12102405
2575645656	josephmuniz	Create	Payer	08/15/2024 15:40:01	13216399
2575645657	josephmuniz	Create	Payer	08/15/2024 15:41:55	13216400
2575645658	josephmuniz	Modify	Payer	08/15/2024 15:42:59	13216400
2575645659	josephmuniz	Modify	Payer	08/15/2024 15:43:38	13216400
2575645660	josephmuniz	Modify	Payer	08/15/2024 15:43:56	13216400

8. The expanded audit history will display the changed field name, the old value, and the new value.

Payer History: HUMANA

2575645643



> Thursday, 08/15/2024 at 1:50 PM GMT-4
1 change made by user *josephmuniz*

Audit ID: 2575645645

Thursday, 08/15/2024 at 1:50 PM GMT-4
1 change made by user *josephmuniz*

Audit ID: 2575645643

Field	Old Value	New Value
Process PR-242 as an Adjustment when an ERA is posted, rather than as Unpaid?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

History not available for updates made before 08/26/2024

Close

9. Once finished, click **Close**.